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2018 Nonresident Visitation, Expenditures & Economic Impact Estimates

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2018 Nonresident Visitation, Expenditures & Economic Impact Estimates

Estimates by full year, quarters, trip purposes &
international visitors

Kara Grau, M.S.

4/18/2019

A collection of 2018 full year and quarterly estimates of nonresident visitation, expenditures by nonresident travelers, and economic impact estimates, including expenditures by purpose of trip, airport of arrival, and international visitors.

Visitation, Expenditures & Economic Impact Estimates

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2018 Nonresident Visitation, Expenditures & Economic Impact Estimates

2019

Table of Contents

2018 Nonresident Expenditures & Economic Contribution	3
2018 Montana Nonresident Traveler Quarterly Travel Comparison.....	4
2018 Montana Nonresident Traveler Expenditure Profiles.....	5
Quarter 1, 2018 Montana Nonresident Traveler Expenditure Profiles	6
Quarter 2, 2018 Montana Nonresident Traveler Expenditure Profiles	7
Quarter 3, 2018 Montana Nonresident Traveler Expenditure Profiles	8
Quarter 4, 2018 Montana Nonresident Traveler Expenditure Profiles	9
2014-2018 Montana Nonresident Traveler Expenditure Trends.....	10
2008 -2018 Montana Nonresident Traveler Visitation Trends	11
2018 Expenditure Comparison of Overseas, Canadian, & Domestic Nonresident Travelers to Montana .	12
2018 Montana Airport of Arrival – Statewide Nonresident Expenditure Profiles.....	13

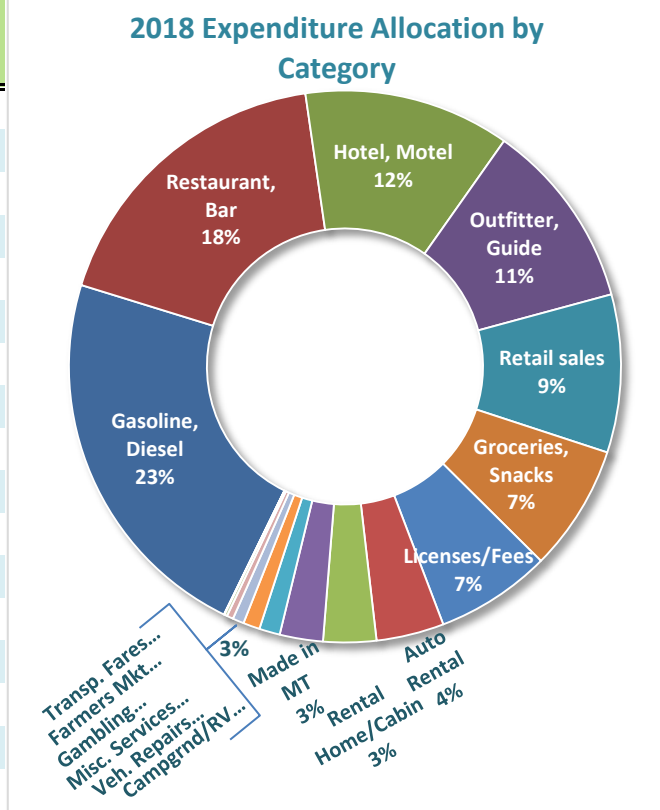
2018 Montana Nonresident Traveler Expenditures & Economic Contribution

2018 Contribution of Nonresident Traveler Expenditures to Montana's Economy

- In 2018, nonresident visitors to Montana spent an estimated \$3.72 billion in the state. (See Table 1, below)
- This \$3.72 billion in local spending directly supports \$3.16 billion of economic activity in the state, and supports an additional \$2.13 billion of economic activity, indirectly. (see Table 2, below)
- The estimated total contribution of nonresident spending to Montana's economy was \$5.28 billion in 2018.

Table 1 - 2018 Nonresident Traveler Expenditures¹

Expenditure Category	Average Daily Per Group ^{2,3}	Allocation by Category	Total Expenditures ^{2,4}
Gasoline, Diesel	\$33.12	23%	\$839,690,000
Restaurant, Bar	\$26.54	18%	\$668,150,000
Hotel, Motel	\$17.87	12%	\$449,710,000
Outfitter, Guide	\$16.52	11%	\$410,110,000
Retail Sales	\$13.63	9%	\$344,570,000
Groceries, Snacks	\$10.95	7%	\$275,380,000
Licenses, Entrance Fees	\$10.28	7%	\$252,130,000
Auto Rental	\$5.89	4%	\$147,730,000
Rental Home, Cabin	\$4.64	3%	\$115,490,000
Made in MT	\$3.79	3%	\$94,310,000
Campground, RV Park	\$1.80	1%	\$45,210,000
Vehicle Repairs	\$1.44	1%	\$36,330,000
Misc. Services	\$1.00	1%	\$24,550,000
Gambling	\$0.54	<1%	\$14,060,000
Farmers Market	\$0.27	<1%	\$6,450,000
Transportation Fares	\$0.03	<1%	\$690,000
Estimated Total	\$148.30		\$3,724,550,000



¹Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT.

²Data are collected quarterly. Therefore, avg. daily expenditures are weighted averages of quarterly figures. ³Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ⁴Expenditure category totals may not add to year total due to rounding.

Table 2 - 2018 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$3,157,010,000	\$1,029,360,000	\$1,098,180,000	\$5,284,550,000
Employment (# of jobs)	43,090	7,190	9,050	59,330
Employee Compensation	\$985,320,000	\$227,110,000	\$292,930,000	\$1,505,360,000
Proprietor Income	\$141,970,000	\$60,480,000	\$47,660,000	\$250,110,000
Other Property Type Income	\$396,700,000	\$192,060,000	\$200,570,000	\$789,330,000
State & Local Taxes				\$230,020,000

Direct impacts result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

Industry Output is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

2018 Montana Nonresident Traveler Quarterly Travel Comparison

	Quarter 1 (Jan-Mar)	Quarter 2 (Apr-Jun)	Quarter 3 (Jul-Sep)	Quarter 4 (Oct-Dec)	Year Total ¹ 2018
Visitation & Length of Stay					
Nonresident Visitors	1,440,000	3,331,000	5,687,000	1,912,000	12,370,000
% of Total	12%	27%	46%	15%	100%
Nonresident Travel Groups	696,000	1,500,000	2,394,000	920,000	5,510,000
% of Total	13%	27%	43%	17%	100%
Group Size (people per group)	2.07	2.24	2.41	2.09	2.27
Length of Stay (nights)	3.93	4.20	5.18	4.17	4.59
Expenditure Category^{2,3} (Average Daily per Group)					
Gasoline, Diesel	\$31.85	\$36.51	\$32.00	\$32.79	\$33.12
Restaurant, Bar	\$27.26	\$26.57	\$27.38	\$22.60	\$26.54
Hotel, B&B, etc.	\$22.85	\$18.54	\$17.26	\$14.70	\$17.87
Outfitter, Guide	\$9.38	\$6.75	\$22.39	\$16.76	\$16.52
Retail Sales	\$10.50	\$14.20	\$14.36	\$12.60	\$13.63
Groceries, Snacks	\$8.91	\$11.37	\$11.97	\$8.07	\$10.95
Licenses, Entrance Fees	\$32.95	\$5.20	\$7.92	\$8.08	\$10.28
Auto Rental	\$6.21	\$4.72	\$6.41	\$5.61	\$5.89
Rental Home, Cabin, Condo	\$5.69	\$3.18	\$5.27	\$3.79	\$4.64
Made in MT	\$3.32	\$3.43	\$4.54	\$1.91	\$3.79
Campground, RV Park	\$0.02	\$2.50	\$2.35	\$0.07	\$1.80
Auto Repair	\$0.31	\$0.80	\$1.79	\$2.15	\$1.44
Misc. Services	\$0.95	\$0.66	\$1.33	\$0.34	\$1.00
Gambling	\$0.46	\$0.88	\$0.40	\$0.60	\$0.54
Farmers Market	\$0.00	\$0.09	\$0.45	\$0.08	\$0.26
Transportation Fares	\$0.11	\$0.03	\$0.01	\$0.02	\$0.03
	\$160.77	\$135.43	\$155.83	\$130.17	\$148.30
Total Expenditures	\$440,000,000	\$852,950,000	\$1,932,150,000	\$499,450,000	\$3,724,550,000
% of Total	12%	23%	52%	13%	100%

¹Data are collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. ²Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups. ³Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures.

Montana Nonresident Traveler Expenditure Profiles

Average 2018 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping	Other
Sample size	11,219	4,446	2,080	2,809	1,259	290	314
Nonresident Travelers	12,370,000	4,911,000	2,297,000	3,103,000	1,391,000	321,000	347,000
Group Size (people/group)	2.27	2.64	2.15	2.14	1.51	1.88	2.06
Length of Stay (nights)	4.59	5.81	6.21	0.85	6.34	0.47	6.07
% of All Travelers in 2018	100%	40%	19%	25%	11%	3%	3%
Gasoline, Diesel	\$33.12	\$27.68	\$21.72	\$52.98	\$28.33	\$38.44	\$33.46
Restaurant, Bar	\$26.54	\$34.09	\$30.46	\$12.47	\$30.18	\$9.99	\$25.02
Hotel, B&B, etc.	\$17.87	\$20.63	\$11.37	\$14.83	\$29.47	\$6.04	\$15.77
Outfitter, Guide	\$16.52	\$36.39	\$4.74	\$0.00	\$2.28	\$0.00	\$3.41
Retail Sales	\$13.63	\$16.16	\$16.23	\$4.12	\$11.29	\$46.19	\$21.92
Groceries, Snacks	\$10.95	\$14.22	\$13.49	\$5.24	\$6.83	\$12.79	\$10.14
Licenses, Entrance Fees	\$10.28	\$22.21	\$8.46	\$0.41	\$5.77	\$3.48	\$9.66
Auto Rental	\$5.89	\$7.67	\$6.21	\$0.41	\$12.39	\$0.91	\$3.06
Rental Cabin, Condo	\$4.64	\$9.36	\$3.56	\$0.25	\$1.09	\$0.00	\$2.02
Made in MT	\$3.79	\$4.90	\$6.30	\$0.64	\$2.81	\$2.16	\$2.36
Campground, RV Park	\$1.80	\$3.05	\$0.65	\$1.19	\$0.30	\$0.06	\$0.25
Auto Repair	\$1.44	\$1.35	\$0.58	\$0.97	\$1.68	\$3.06	\$8.99
Misc. Services	\$1.00	\$0.74	\$1.62	\$0.13	\$1.18	\$1.02	\$8.63
Gambling	\$0.54	\$0.52	\$0.94	\$0.26	\$0.99	\$0.46	\$0.66
Farmers Market	\$0.26	\$0.34	\$0.46	\$0.06	\$0.10	\$0.02	\$0.20
Transportation Fares	\$0.03	\$0.04	\$0.01	\$0.00	\$0.09	\$0.00	\$0.05
Total Avg. Daily per Group	\$148.30	\$199.34	\$126.81	\$93.97	\$134.80	\$124.62	\$145.61

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=9,193)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	5830	63%	\$52.72	\$42.00
Restaurant, Bar	4535	49%	\$53.44	\$40.00
Groceries, Snacks	2867	31%	\$34.27	\$20.00
Hotel, B&B, etc.	2801	30%	\$128.54	\$111.00
Licenses, Entrance Fees	1504	16%	\$67.58	\$16.67
Retail Sales	1352	15%	\$91.32	\$50.00
Campground, RV Park	1016	11%	\$38.11	\$40.00
Made in MT	917	10%	\$36.15	\$20.00
Auto Rental	850	9%	\$62.17	\$60.00
Rental Cabin, Condo	472	5%	\$192.78	\$180.00
Farmers Market	397	4%	\$5.02	\$3.01
Outfitter, Guide	384	4%	\$355.63	\$294.82
Misc. Services	208	2%	\$40.57	\$20.00
Gambling	153	2%	\$34.97	\$20.00
Auto Repair	101	1%	\$120.04	\$84.18
Transportation Fares	29	<1%	\$10.17	\$8.06

Data are collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures.

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value.

Quarter 1, 2018

Montana Nonresident Traveler Expenditure Profiles

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Average Q1 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	1,780	458	364	531	299	43	82
Nonresident Travelers	1,440,000	372,000	295,000	431,000	242,000	35,000	66,000
Group Size (people/group)	2.07	2.70	1.92	2.04	1.45	2.03	1.81
Length of Stay (nights)	3.93	5.74	6.04	0.63	4.62	0.86	4.86
% of All Travelers in Q1	100%	26%	21%	30%	17%	2%	5%
Licenses, Entrance Fees	\$32.95	\$103.36	\$24.01	\$0.13	\$10.93	\$0.79	\$30.57
Gasoline, Diesel	\$31.85	\$21.51	\$16.44	\$52.78	\$25.16	\$44.54	\$27.15
Restaurant, Bar	\$27.26	\$47.66	\$28.84	\$9.12	\$31.66	\$9.07	\$29.34
Hotel, B&B, etc.	\$22.85	\$28.65	\$11.17	\$15.88	\$40.08	\$17.57	\$27.33
Retail Sales	\$10.50	\$14.37	\$11.48	\$1.02	\$7.55	\$42.09	\$50.31
Outfitter, Guide	\$9.38	\$31.84	\$4.21	\$0.00	\$4.79	\$0.00	\$0.00
Groceries, Snacks	\$8.91	\$15.26	\$13.07	\$3.67	\$4.78	\$11.01	\$7.99
Auto Rental	\$6.21	\$9.05	\$7.28	\$0.17	\$13.81	\$0.00	\$2.52
Rental Cabin, Condo	\$5.69	\$18.55	\$4.08	\$0.00	\$1.40	\$0.00	\$3.59
Made in MT	\$3.32	\$5.38	\$7.07	\$0.31	\$2.53	\$1.95	\$0.21
Misc. Services	\$0.95	\$0.41	\$0.82	\$0.00	\$1.51	\$1.71	\$9.87
Gambling	\$0.46	\$0.65	\$0.89	\$0.11	\$0.39	\$0.33	\$0.28
Auto Repair	\$0.31	\$0.79	\$0.24	\$0.17	\$0.00	\$0.76	\$0.00
Transportation Fares	\$0.11	\$0.12	\$0.04	\$0.00	\$0.36	\$0.00	\$0.23
Campground, RV Park	\$0.02	\$0.02	\$0.00	\$0.04	\$0.05	\$0.00	\$0.00
Farmers Market	\$0.00	\$0.00	\$0.01	\$0.00	\$0.00	\$0.00	\$0.01
Total Avg. Daily per Group	\$160.77	\$297.62	\$129.65	\$83.40	\$145.00	\$129.82	\$189.40

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,438)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	888	62%	\$51.61	\$42.00
Restaurant, Bar	747	52%	\$52.50	\$35.00
Hotel, B&B, etc.	465	32%	\$107.75	\$100.00
Groceries, Snacks	386	27%	\$33.23	\$20.00
Licenses, Entrance Fees	215	15%	\$220.76	\$120.00
Auto Rental	146	10%	\$61.12	\$65.00
Retail Sales	128	9%	\$117.67	\$50.00
Made in MT	109	8%	\$43.89	\$30.00
Rental Cabin, Condo	61	4%	\$205.95	\$166.86
Outfitter, Guide	40	3%	\$336.09	\$394.44
Misc. Services	24	2%	\$57.58	\$42.13
Gambling	23	2%	\$28.26	\$38.40
Transportation Fares	10	1%	\$15.08	\$15.09
Campground, RV Park	7	<1%	\$9.42	\$9.42
Auto Repair	7	<1%	\$66.14	\$98.54
Farmers Market	4	<1%	\$0.82	\$0.90

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹ Visiting friends and/or relatives. ² Mean, or average, is the sum of the values divided by the number of values. ³ Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 2, 2018

Montana Nonresident Traveler Expenditure Profiles

Average Q2 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other
Sample size	3,354	1,314	598	884	354	97	107
Nonresident Travelers	3,331,000	1,306,000	593,000	876,000	353,000	97,000	107,000
Group Size (people/group)	2.24	2.62	2.07	2.09	1.56	1.67	2.43
Length of Stay (nights)	4.20	5.40	5.60	0.97	6.13	0.45	5.68
% of All Travelers in Q2	100%	39%	18%	26%	11%	3%	3%
Gasoline, Diesel	\$36.51	\$28.61	\$25.81	\$56.59	\$33.31	\$41.00	\$30.83
Restaurant, Bar	\$26.57	\$32.50	\$27.73	\$15.37	\$33.76	\$9.81	\$33.37
Hotel, B&B, etc.	\$18.54	\$20.67	\$13.41	\$16.48	\$29.19	\$3.72	\$16.80
Retail Sales	\$14.20	\$17.02	\$16.52	\$5.06	\$10.62	\$50.30	\$15.99
Groceries, Snacks	\$11.37	\$13.22	\$17.17	\$5.98	\$8.25	\$15.10	\$9.89
Outfitter, Guide	\$6.75	\$15.70	\$1.15	\$0.00	\$0.14	\$0.00	\$8.44
Licenses, Entrance Fees	\$5.20	\$9.48	\$4.98	\$0.57	\$1.39	\$4.04	\$4.80
Auto Rental	\$4.72	\$5.80	\$5.66	\$0.11	\$11.95	\$0.32	\$5.33
Made in MT	\$3.43	\$4.83	\$4.60	\$0.65	\$3.48	\$0.17	\$6.24
Rental Cabin, Condo	\$3.18	\$6.26	\$2.23	\$0.39	\$1.27	\$0.00	\$2.49
Campground, RV Park	\$2.50	\$4.54	\$0.88	\$1.81	\$0.56	\$0.13	\$0.00
Gambling	\$0.88	\$0.46	\$1.77	\$0.56	\$1.91	\$0.77	\$1.03
Auto Repair	\$0.80	\$0.35	\$0.39	\$0.14	\$1.39	\$6.40	\$5.61
Misc. Services	\$0.66	\$0.62	\$0.90	\$0.11	\$0.52	\$1.10	\$4.19
Farmers Market	\$0.09	\$0.11	\$0.18	\$0.03	\$0.12	\$0.00	\$0.00
Transportation Fares	\$0.03	\$0.03	\$0.01	\$0.00	\$0.11	\$0.00	\$0.00
Total Avg. Daily per Group	\$135.43	\$160.20	\$123.39	\$103.85	\$137.97	\$132.86	\$145.01

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=3,364)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	1811	54%	\$54.58	\$43.00
Restaurant, Bar	1420	42%	\$50.69	\$40.00
Groceries, Snacks	952	28%	\$32.33	\$20.00
Hotel, B&B, etc.	830	25%	\$124.93	\$110.00
Retail Sales	452	13%	\$85.12	\$440.00
Campground, RV Park	405	12%	\$36.64	\$40.00
Licenses, Entrance Fees	367	11%	\$38.30	\$12.95
Made in MT	310	9%	\$29.94	\$20.00
Auto Rental	215	6%	\$59.42	\$58.00
Rental Cabin, Condo	102	3%	\$174.10	\$170.00
Farmers Market	81	2%	\$3.15	\$3.33
Outfitter, Guide	78	2%	\$235.58	\$250.00
Misc. Services	67	2%	\$26.62	\$18.73
Gambling	57	2%	\$41.66	\$20.00
Auto Repair	34	1%	\$62.65	\$84.18
Transportation Fares	9	<1%	\$7.83	\$8.06

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 3, 2018

Montana Nonresident Traveler Expenditure Profiles

Average Q3 Daily Expenditures by Purpose of Trip[^]

	Primary Purpose of Trip						
	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	4,253	2,210	683	868	321	95	76
Nonresident Travelers	5,687,000	2,956,000	913,000	1,160,000	429,000	127,000	101,000
Group Size (people/group)	2.41	2.67	2.31	2.26	1.56	1.94	1.86
Length of Stay (nights)	5.18	6.10	6.78	0.91	7.72	0.42	7.98
% of All Travelers in Q3	100%	52%	16%	20%	8%	2%	2%
Gasoline, Diesel	\$32.00	\$28.51	\$21.16	\$50.92	\$27.07	\$34.13	\$35.71
Restaurant, Bar	\$27.38	\$32.59	\$33.61	\$11.69	\$27.39	\$8.70	\$18.60
Outfitter, Guide	\$22.39	\$39.27	\$7.53	\$0.00	\$4.20	\$0.00	\$1.98
Hotel, B&B, etc.	\$17.26	\$19.50	\$11.15	\$14.28	\$28.02	\$2.17	\$10.09
Retail Sales	\$14.36	\$16.49	\$17.39	\$4.14	\$13.85	\$34.18	\$14.01
Groceries, Snacks	\$11.97	\$14.91	\$12.79	\$5.48	\$7.03	\$11.31	\$11.47
Licenses, Entrance Fees	\$7.92	\$10.97	\$7.36	\$0.38	\$8.98	\$5.61	\$4.30
Auto Rental	\$6.41	\$8.03	\$7.15	\$0.64	\$11.27	\$2.68	\$0.00
Rental Cabin, Condo	\$5.27	\$8.56	\$4.14	\$0.18	\$0.72	\$0.00	\$0.00
Made in MT	\$4.54	\$5.19	\$8.11	\$0.85	\$3.17	\$5.38	\$0.39
Campground, RV Park	\$2.35	\$3.61	\$0.95	\$1.27	\$0.36	\$0.05	\$0.67
Auto Repair	\$1.79	\$1.79	\$0.97	\$1.62	\$0.25	\$2.72	\$17.15
Misc. Services	\$1.33	\$0.92	\$2.63	\$0.23	\$1.87	\$0.54	\$14.54
Farmers Market	\$0.45	\$0.53	\$0.84	\$0.11	\$0.17	\$0.08	\$0.52
Gambling	\$0.40	\$0.42	\$0.65	\$0.10	\$0.69	\$0.17	\$0.00
Transportation Fares	\$0.01	\$0.02	\$0.01	\$0.00	\$0.02	\$0.00	\$0.00
Total Avg. Daily per Group	\$155.83	\$191.31	\$136.44	\$91.90	\$135.06	\$107.73	\$129.42

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=4,246)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	2193	52%	\$52.26	\$41.00
Restaurant, Bar	1764	42%	\$55.56	\$40.00
Groceries, Snacks	1173	28%	\$36.52	\$24.00
Hotel, B&B, etc.	1072	25%	\$149.06	\$134.00
Licenses, Entrance Fees	755	18%	\$37.60	\$12.00
Campground, RV Park	588	14%	\$39.93	\$35.00
Retail Sales	586	14%	\$87.77	\$50.00
Made in MT	401	9%	\$40.55	\$20.00
Auto Rental	342	8%	\$67.03	\$65.00
Farmers Market	284	7%	\$5.69	\$3.00
Rental Cabin, Condo	251	6%	\$194.83	\$200.00
Outfitter, Guide	235	6%	\$340.44	\$248.66
Misc. Services	94	2%	\$50.75	\$20.00
Gambling	57	1%	\$25.15	\$20.00
Auto Repair	48	1%	\$133.76	\$182.78
Transportation Fares	6	<1%	\$7.19	\$7.19

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

^{^^} These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

Quarter 4, 2018

Montana Nonresident Traveler Expenditure Profiles

Average Q4 Daily Expenditures by Purpose of Trip[^]

Primary Purpose of Trip

	All Travelers	Vacation	VFR ¹	Pass-Through	Business	Shopping*	Other*
Sample size	1,816	463	435	527	285	56	49
Nonresident Travelers	1,912,000	487,000	459,000	554,000	300,000	59,000	52,000
Group Size (people/group)	2.09	2.48	2.10	2.09	1.44	2.02	2.02
Length of Stay (nights)	4.17	5.40	6.06	0.74	6.22	0.38	5.13
% of All Travelers in Q4	100%	26%	24%	29%	16%	3%	3%
Gasoline, Diesel	\$32.79	\$27.66	\$21.40	\$49.13	\$26.27	\$33.83	\$45.22
Restaurant, Bar	\$22.60	\$31.54	\$27.06	\$9.01	\$29.57	\$13.70	\$13.75
Outfitter, Guide	\$16.76	\$65.25	\$2.72	\$0.00	\$0.00	\$0.00	\$0.00
Hotel, B&B, etc.	\$14.70	\$18.58	\$9.24	\$11.26	\$25.53	\$3.53	\$9.48
Retail Sales	\$12.60	\$14.50	\$16.24	\$3.51	\$10.05	\$64.26	\$11.47
Licenses, Entrance Fees	\$8.08	\$25.73	\$4.81	\$0.25	\$2.36	\$1.87	\$1.87
Groceries, Snacks	\$8.07	\$11.31	\$10.55	\$3.64	\$6.00	\$13.09	\$10.63
Auto Rental	\$5.61	\$7.95	\$3.68	\$0.76	\$14.00	\$0.00	\$7.07
Rental Cabin, Condo	\$3.79	\$10.38	\$3.51	\$0.21	\$1.33	\$0.00	\$4.05
Auto Repair	\$2.15	\$1.49	\$0.07	\$1.93	\$5.68	\$0.00	\$9.59
Made in MT	\$1.91	\$2.98	\$3.31	\$0.27	\$1.52	\$0.57	\$1.51
Gambling	\$0.60	\$1.05	\$0.61	\$0.01	\$0.71	\$0.56	\$2.31
Misc. Services	\$0.34	\$0.30	\$0.50	\$0.00	\$0.60	\$0.88	\$0.71
Farmers Market	\$0.08	\$0.07	\$0.18	\$0.05	\$0.02	\$0.00	\$0.17
Campground, RV Park	\$0.07	\$0.17	\$0.00	\$0.06	\$0.04	\$0.00	\$0.11
Transportation Fares	\$0.02	\$0.05	\$0.01	\$0.00	\$0.03	\$0.00	\$0.00
Total Avg. Daily per Group	\$130.17	\$219.01	\$103.89	\$80.09	\$123.71	\$132.29	\$117.94

Average Daily Expenditures of Those Who Spent in Each Category^{^^}

Expenditure Category	# of Groups Who Spent	Percent of Sample (n=1,816)	Mean ² of Those Who Spent	Median ³ of Those Who Spent
Gasoline, Diesel	938	52%	\$51.26	\$41.00
Restaurant, Bar	604	33%	\$54.85	\$40.00
Hotel, B&B, etc.	433	24%	\$107.02	\$100.00
Groceries, Snacks	356	20%	\$33.18	\$20.00
Retail Sales	186	10%	\$99.34	\$50.00
Licenses, Entrance Fees	168	9%	\$70.47	\$32.44
Auto Rental	147	8%	\$55.93	\$50.00
Made in MT	97	5%	\$29.04	\$20.94
Rental Cabin, Condo	59	3%	\$202.94	\$150.00
Outfitter, Guide	31	2%	\$802.18	\$700.00
Farmers Market	29	2%	\$4.13	\$3.32
Misc. Services	23	1%	\$21.82	\$12.00
Gambling	16	1%	\$55.97	\$37.95
Campground, RV Park	15	1%	\$20.82	\$24.57
Auto Repair	12	1%	\$258.23	\$393.51
Transportation Fares	4	<1%	\$7.10	\$7.10

[^] Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

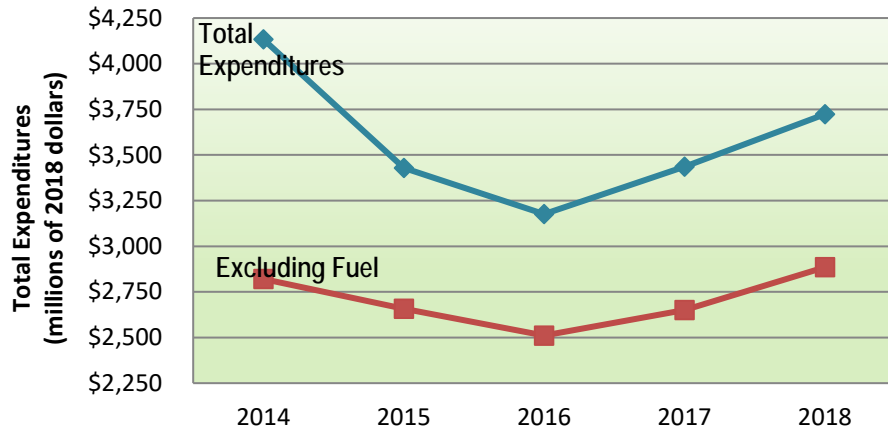
^{^^}These figures represent the number and percent of visitor groups who actually spent money in each category. The dollar values are reflective of the actual average amount spent per category.

Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Expenditures represent 24 hours worth of travel group spending.

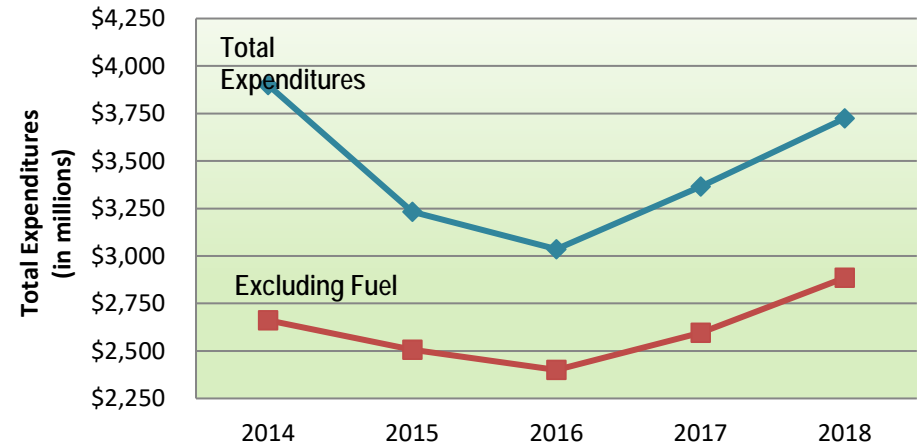
¹Visiting friends and/or relatives. ²Mean, or average, is the sum of the values divided by the number of values. ³Median is the middle value in a string of numbers, with half of the values higher, and half lower than the median value. *Small sample size, use with caution.

2014-2018 Montana Nonresident Traveler Expenditure Trends Overall Total & Excluding Fuel*

Total Inflation-Adjusted Expenditures



Total Actual Expenditures

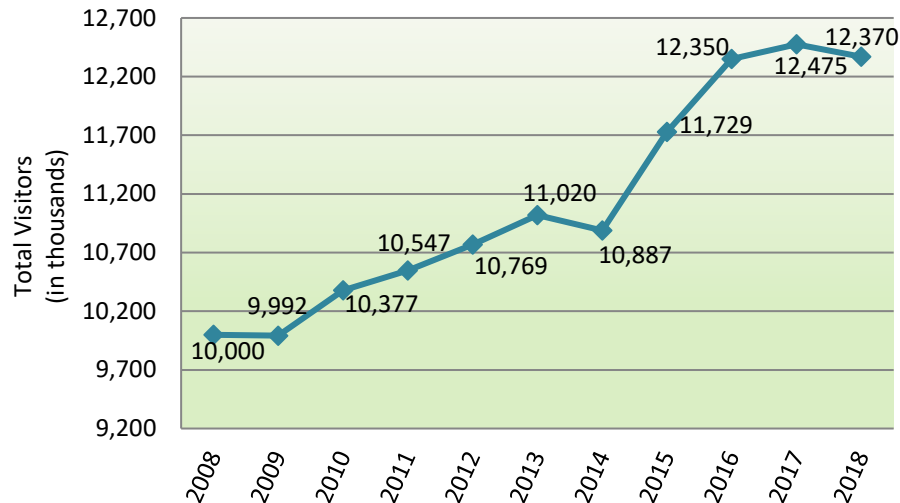


Nonresident Traveler Expenditure Trends	2008	2009	2010	2011	2012	2013	2014	2014	2016	2017	2018
Total Inflation-adjusted Expenditures											
(millions of 2018 dollars ¹)	\$3,203	\$2,667	\$2,799	\$3,122	\$3,575	\$3,901	\$4,133	\$3,429	\$3,176	\$3,435	\$3,724
% Change from Previous Year	-15.2%	-16.7%	4.9%	11.5%	14.5%	9.1%	5.9%	-17.0%	-7.4%	8.2%	8.4%
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Excluding Fuel Expenditures (2018\$)	\$2,310	\$1,833	\$1,889	\$2,056	\$2,314	\$2,647	\$2,820	\$2,658	\$2,511	\$2,650	\$2,885
% Change from Previous Year	-15.0%	-20.6%	3.1%	8.8%	12.5%	14.4%	6.5%	-5.7%	-5.5%	5.5%	8.9%
<hr/>											
Total Actual Expenditures (in millions)											
	\$2,728	\$2,272	\$2,447	\$2,774	\$3,269	\$3,624	\$3,900	\$3,233	\$3,036	\$3,365	\$3,724
% Change from Previous Year	-11.6%	-16.7%	7.7%	13.4%	17.8%	10.9%	7.6%	-17.1%	-6.1%	10.8%	10.7%
<hr/>											
Excluding Fuel Expenditures	\$1,967	\$1,561	\$1,651	\$1,827	\$2,116	\$2,459	\$2,661	\$2,506	\$2,400	\$2,596	\$2,885
% Change from Previous Year	-11.4%	-20.6%	5.8%	10.7%	15.8%	16.2%	8.2%	-5.8%	-4.2%	8.2%	11.1%

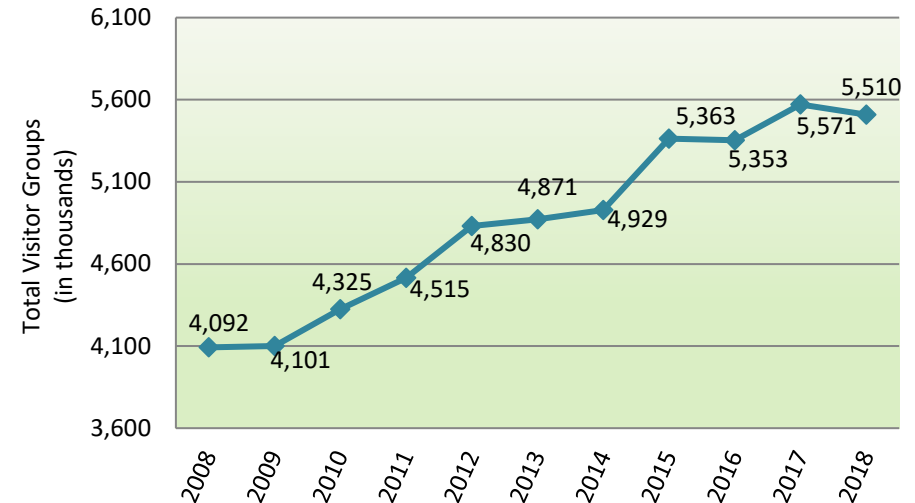
*Fuel is generally the largest portion of nonresident travelers' spending, making total traveler expenditure figures susceptible to fluctuations in gas prices. Removing fuel expenditures from the total allows for the trend to be viewed without this external factor's effect. ¹U.S. Bureau of Labor Statistics. Consumer Price Index - All Urban Consumers.

2008-2018 Montana Nonresident Traveler Visitation Trends

Nonresident Visitors



Nonresident Travel Groups



Nonresident Traveler Visitation Trends	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Nonresident Visitors (in thousands)	10,000	9,992	10,377	10,547	10,769	11,020	10,887	11,729	12,350	12,475	12,370
% Change from Previous Year	-6.4%	-0.1%	3.9%	1.6%	2.1%	2.3%	-1.2%	7.7%	5.3%	1.0%	-0.8%
Nonresident Travel Groups (in thousands ¹)	4,092	4,101	4,325	4,515	4,830	4,871	4,929	5,363	5,353	5,571	5,510
% Change from Previous Year	-6.1%	0.2%	5.5%	4.4%	7.0%	0.8%	1.2%	8.8%	-0.2%	4.1%	-1.1%
Average people per group	2.45	2.46	2.38	2.31	2.22	2.24	2.19	2.19	2.31	2.23	2.27

¹Beginning in 2010, group size is a weighted average of quarterly group sizes.

2018 Expenditure Comparison of Overseas, Canadian, and Domestic Nonresident Travelers to Montana

Overseas Visitors ¹				Canadian Visitors				Domestic Visitors			
Sample size	274			1,180			9,761				
Nonresident Travelers	310,000			1,336,000			10,725,000				
Group Size (people/group)	2.75			2.23			2.26				
Length of Stay (nights)	5.55			2.15			4.85				
% of All Travelers in 2018	3%			10%			87%				
Expenditure Category ^{2,3}	Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend		Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend		Avg. Daily Group Expend. ⁴	% of Daily Expend.	Avg. Trip Expend
Gasoline, Diesel	\$20.03	9%	\$109.02		\$41.84	32%	\$89.26		\$32.41	22%	\$157.23
Restaurant, Bar	\$39.64	18%	\$215.77		\$21.21	16%	\$45.24		\$26.93	18%	\$130.64
Hotel, B&B, etc.	\$24.02	11%	\$130.77		\$16.64	13%	\$35.51		\$17.78	12%	\$86.25
Outfitter, Guide	\$10.25	5%	\$55.79		\$2.81	2%	\$6.00		\$18.44	12%	\$89.47
Retail Sales	\$10.30	5%	\$56.04		\$17.72	13%	\$37.81		\$13.26	9%	\$64.31
Groceries, Snacks	\$19.00	9%	\$103.41		\$10.99	8%	\$23.44		\$10.68	7%	\$51.81
Licenses, Entrance Fees	\$63.24	29%	\$344.25		\$11.19	9%	\$23.87		\$9.66	6%	\$46.85
Auto Rental	\$4.17	2%	\$22.70		\$0.92	1%	\$1.97		\$6.51	4%	\$31.61
Rental Home, Cabin	\$14.78	7%	\$80.45		\$1.78	1%	\$3.81		\$4.91	3%	\$23.84
Made in Montana	\$4.64	2%	\$25.26		\$2.02	2%	\$4.30		\$4.02	3%	\$19.48
Campground, RV Park	\$1.35	1%	\$7.35		\$1.54	1%	\$3.28		\$1.85	1%	\$8.97
Auto Repair	\$4.67	2%	\$25.42		\$1.20	1%	\$2.57		\$1.44	1%	\$6.97
Misc. Services	\$1.48	1%	\$8.05		\$0.56	<1%	\$1.19		\$1.02	1%	\$4.93
Gambling	\$0.11	<1%	\$0.61		\$0.86	1%	\$1.84		\$0.52	<1%	\$2.54
Farmers Market	\$0.26	<1%	\$1.41		\$0.13	<1%	\$0.28		\$0.28	<1%	\$1.38
Transportation Fares	\$0.00	<1%	\$0.00		\$0.02	<1%	\$0.05		\$0.03	<1%	\$0.13
Total Average Daily per Group	\$217.94		\$1,186.32		\$131.43		\$280.43		\$149.74		\$726.39
Total 2018 Expenditures	\$160,029,000				\$154,956,000				\$3,409,565,000		
% of Total	4%				4%				92%		

¹Numerous overseas visitors may pre-pay for many of their trip expenses, which are not reflected here; these figures represent only expenditures made in MT. ²Data is collected quarterly. Therefore, year total group size, length of stay and avg. daily expenditures are weighted averages of quarterly figures. ³Spending data are gathered from nonresident travelers intercepted at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ⁴Expenditures may appear lower than typical costs in these categories because they are averaged across all visitor groups.

2018 Montana Airport of Arrival Statewide Nonresident Expenditure Profiles

Avg. Daily Group Expenditures by Airport of Arrival¹ (Expenditures represent full trip in MT, not spending exclusively in arrival city.)

	Airport of Arrival in Montana ^{2, 3}						
	All Fliers	Billings	Bozeman	Great Falls	Helena	Kalispell	Missoula
Sample size	1,301	n=228	n=447	n=110	n=65	n=205	n=236
Nonresident Travelers	1,472,000	248,000	485,000	119,000	71,000	223,000	255,000
Group Size (people/group)	2.17	2.04	2.46	1.57	1.71	2.30	1.78
Length of Stay (nights)	6.38	5.72	6.61	6.05	5.84	7.70	6.73
% of All Travelers in 2018	11.9%	2.0%	3.9%	1.0%	0.6%	1.8%	2.1%
Outfitter, Guide	\$51.72	\$21.65	\$56.76	\$24.81	\$15.85	\$28.82	\$47.06
Restaurant, Bar	\$49.18	\$33.66	\$53.52	\$42.39	\$50.48	\$55.19	\$40.04
Auto Rental	\$34.68	\$39.44	\$31.01	\$22.81	\$22.16	\$32.03	\$24.60
Licenses, Entrance Fees	\$25.83	\$3.93	\$38.51	\$9.88	\$9.21	\$18.99	\$10.21
Hotel, B&B, etc.	\$22.25	\$25.35	\$24.97	\$18.81	\$18.39	\$19.30	\$21.08
Retail Sales	\$20.88	\$5.10	\$19.58	\$11.90	\$12.36	\$20.50	\$15.99
Groceries, Snacks	\$12.72	\$5.94	\$14.94	\$10.33	\$8.27	\$12.43	\$10.96
Gasoline, Diesel	\$11.18	\$13.88	\$8.71	\$10.87	\$4.90	\$10.24	\$10.70
Rental Cabin, Condo	\$8.87	\$2.04	\$9.76	\$3.97	\$5.37	\$13.24	\$9.16
Made in Montana	\$7.19	\$2.32	\$2.21	\$5.02	\$3.19	\$6.81	\$7.50
Misc. Services	\$1.37	\$0.00	\$7.83	\$1.13	\$3.71	\$1.89	\$0.85
Gambling	\$0.53	\$0.28	\$0.50	\$1.06	\$0.50	\$0.40	\$0.91
Farmers Market	\$0.30	\$0.01	\$0.06	\$0.09	\$0.14	\$0.34	\$0.39
Campground, RV Park	\$0.21	\$0.31	\$0.26	\$0.00	\$0.03	\$0.33	\$0.17
Transportation Fares	\$0.14	\$0.00	\$0.07	\$0.04	\$0.18	\$0.03	\$0.01
Auto Repair	\$0.04	\$0.00	\$0.34	\$0.05	\$0.00	\$0.82	\$0.00
Total Avg. Daily per Group	\$247.09	\$153.92	\$269.03	\$163.16	\$154.73	\$221.37	\$199.63
Estimate of Statewide Spending	\$1,074,170,000	\$117,590,000	\$464,950,000	\$63,280,000	\$34,480,000	\$204,690,000	\$185,050,000

¹Spending data are gathered via on-site surveys of nonresident travelers at airports, gas stations, and rest areas in MT. Travelers report 24 hours worth of trip expenditures. ²Spending data presented here are representative of expenditures in MT by traveler groups who flew into one of the listed airports. ³Butte and West Yellowstone airports had insufficient sample sizes for inclusion in this analysis.